HOW DO CASE MANAGERS REFER PARTICIPANTS USING E-JAS?

There are four identified ways a case manager will refer WorkFirst participants to service providers. Included in this document you will find instructions for the following two methods:

- Referring WorkFirst participants to a certified contractor or partner that has a contractor ID code in e-JAS, and
- Referring WorkFirst participants to a non-certified service provider that does not have a contractor ID code in e-JAS.

The other two methods have special instructions included in the WorkFirst Handbook. They are:

- Referring participants to job search services with ESD (Chapter 4.2: Tracking Referrals), and
- Referring participants to Community Jobs (Chapter 8.3: Community Jobs).

How do I refer a WorkFirst participant to a certified contractor/partner that has a contractor ID code in e-JAS?

Case managers refer participants to service providers electronically through e-JAS.

Note: The RO referral code will not be used in these situations.

1) The case manager will:
   a. Enter the appropriate component code on the Component/IRP screen to reflect the activity the participant is being referred for,
   b. Enter the contractor ID code for the contractor providing the service,
   c. Enter the appropriate block of time for that activity,
   d. Enter the "Start Date" field with the date the referral is being made,
   e. Enter the "Scheduled End Date" with the date you anticipate the activity to end,
   f. Update the contractor screen with the "Scheduled Start Date" and "Scheduled End Date" using the same dates entered on the Component/IRP screen.
   g. Update the start and end date and add any other necessary requirements in the IRP template that automatically populated in the IRP screen.

2) e-JAS will automatically take the case manager to the "Contractor Referral/Monthly WorkFirst Activities Verification Menu" screen. The case manager will:
   a. Select the component code and the contractor code, and
   b. Electronically complete the "Contractor Referral Form" and e-message the referral to the contractor.
   c. e-JAS will then automatically move to the "Monthly WorkFirst Activities Verification Form". Select cancel/exit to go past this form. This form does

> d. not need to be completed. The contractor/partner will be reporting each month electronically via e-JAS. (This form is used when the participant is referred to a non-contracted service provider).

3) The contractor will:
>   a. Accept or reject the referral,
>   b. Have varying lengths of time to accept or reject the referral. The time frames are:
>   - Protective Payee contractors =   3 days
>   - All other contractors   =   7 days
>   - Community Jobs contractors =   14 days
>   c. Have first contact with the participant within 10 days of the date the referral is accepted,
>   d. Document the first contact with the participant in Client Notes. The date the entry is made in Client Notes is the date that will pre-fill on the contractor screen as the contractor's first contact with the participant, and
>   e. Update the "Contractor Caseload" screen with an actual start date of the activity, when determined.

4) e-JAS will:
>   a. Enter the date the contractor accepts or rejects the referral on the "Contractor Caseload" screen. There will either be an "A" (if the contractor accepts) or "R" (if they reject) next to the date,
>   b. Require the contractor to send an e-message to the referring case manager when a referral is rejected,
>   c. Pre-fill the "First Contact Date" field with the same date the contractor's entry is posted in "Client Notes",
>   d. Count the activity as participation once the contractor has updated the "Actual Start Date" field. Until that time, the client is considered to be in referral status.

How do I refer a WorkFirst participant to a non-contracted service provider that does not have a contractor ID code in e-JAS?

The process for referring participants to service providers who do not have access to e-JAS and are not contracted with DSHS is different than the referral process for contractors with ID codes.

Note: In these situations, the case manager uses the RO component code in e-JAS to identify the participant has been referred for the service.

1) The case manager will:
>   a. Enter the RO component code on the Component/IRP screen to identify the client has been referred for a service that is not contracted,

b. Enter the appropriate block of time that will be associated with the activity. If the participant is being referred for an assessment and it is unclear what block of time the activity will be, enter the 0 (zero) block of time until the assessment has been completed and the service provider determines the level of participation,

c. Enter the "Start Date" field with the date the referral is being made,

d. Enter the "Scheduled End Date" with the date you anticipate the referral period to end (this should be no more than seven calendar days from the date of the referral), e-JAS will have a pop up box questioning if you want to add a contractor code. You do not want to add a contract code, select "Cancel" and continue, and

e. Create an IRP for the participant that includes all of the required elements. In these cases, no automated IRP template will be available.

2) e-JAS will automatically take the case manager to the "Contractor Referral/Monthly WorkFirst Activities Verification Menu" screen. The case manager will:

a. Select the component code (RO), e-JAS will then automatically move to the "Monthly WorkFirst Activities Verification" Form,

b. Complete the "Monthly WorkFirst Activities Verification" form. This is the referral to the non-contracted service provider,

c. Use the "Monthly WorkFirst Activities Verification" form as the communication document between the case manager and the non-certified service provider to verify participation. The participant is responsible to have the service provider complete the form and return it to the case manager, and

d. Close the RO code and enter the appropriate component code in e-JAS along with supporting documentation, once the confirmation of the clients actual start date of the activity has been received.

* These instructions are for the referral process only. They do not include information about monthly monitoring of participation. Those instructions will be provided in a separate document.